

Luma Budget Quick Reference Guide (QRG)

Vacant & Other PC Adjustments (6300)

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Initiator: Any budget employee

Reason: To fill out the necessary forms in the budget.

This Budget Form is where agencies will report in the plan surrounding any vacant positions for their agency. This Budget Form is key in completing the Personnel Cost Forecasting Summary (PCF) Report (B6).

There are many additional Budget Forms in the Luma Budget system that contain additional information necessary for completing the the PCF report. They are the following:

- Supplemental & Line Item Requests (5100)
- 8 series Transfer Request Form (5600)
- Group Positions (4300)
- Salary and Benefit Changes (6200)

These forms along with the Fund Vacant Position form will complete the Personnel Costs (PC) budgeted for the PCF report.

In this Budget Form, the salary and benefits of the last incumbent of the vacant positions will be available. Changes by position must be noted in the comments if the vacant position salary changes but the base PC budget remains the same. If there are any additional funding or upgrades needed for a vacant position, the request must be in a 04.3x or 12.0x DU.

Any transfers to the vacant positions must be completed in the **8 series Transfer Request Form (5600)** only and **NOT** in this form. This is due to reporting requirements. Additionally, this form as well as many of the forms listed above contain Position Tabs. For reporting on the Salary and Wage Reconciliation Report, it is recommended to use the Position Tabs for the most accurate information and to calculate the Salary and Benefit Changes accurately. Values for CEC, variable benefit changes, and health insurance changes are only calculated when using the Position Tabs and not when adding additional PC dollars on the Detail Tab.

This form as with the other budget forms starts with the Summary Overview Screen. Agencies can add as many Parent Transactions needed with Add New option.

Vacant Positions & Other PC Adjustments (6300)

Quick Search: [Show Advanced Filters](#)

Record Actions: [Add New](#) [Create Budget Forms](#) [Screen Configuration](#) [Action Configuration](#)

Form ID	Description	Stage	Agency	Vacant Total	Form Rows	Last Update	Last User	Submit	Actions
3223	State Controller	6301	140	False	22	1/30/2021	APPROP_USER	Submit	Header Detail Delete

Records per page: 50 [v](#)

Records: 1 - Page: 1

After selecting “Add New” the Create a new Budget Form – 6300 Screen will appear. Select save when entry is complete. The system will proceed to the Header Tab.

Create a new Budget Form - 6300

[Close](#) [Screen Configuration](#) [Action Configuration](#)

Stage:*

Agency:* [Search](#) [X](#)

[Save](#) [Cancel](#)

Header Tab

This tab has no real narrative for agencies to enter. If there is an additional explanation needed, the Attachment tab is available for additional documents. Proceed to the Vacant Position Funding Tab.

Budget Form Header

Comment History
Comment
Submit
Configuration
Close

Instance ID	Form Definition	Definition Name	Name	Agency
3228	6300	Vacant Positions & Other PC Adjustments (6300)	State Treasurer	150

Stage Code:*

Initial Entry

Agency

State Treasurer

Header
Detail
Vacant Position Funding
Attachments

Name:*
Save

Analyst's Comments

Vacant Position Funding Tab:

This Budget Form is for Agencies to review all the vacant positions and ensure the vacant position salaries, benefits, and allocations are recorded correctly and accurately for agencies to report on how they are spending their base budget.

Note: New requests of either vacant (upgrades) requiring an increase in funding will need to be an supplemental or line item request (5100).

Below is the Position tab overview screen which will note all the selected vacant positions.

Form Positions

Page Actions:

Close
Employee Changes
Template for Vacant Salaries
Import for Vacant Salaries
Calculate
Status
Refresh

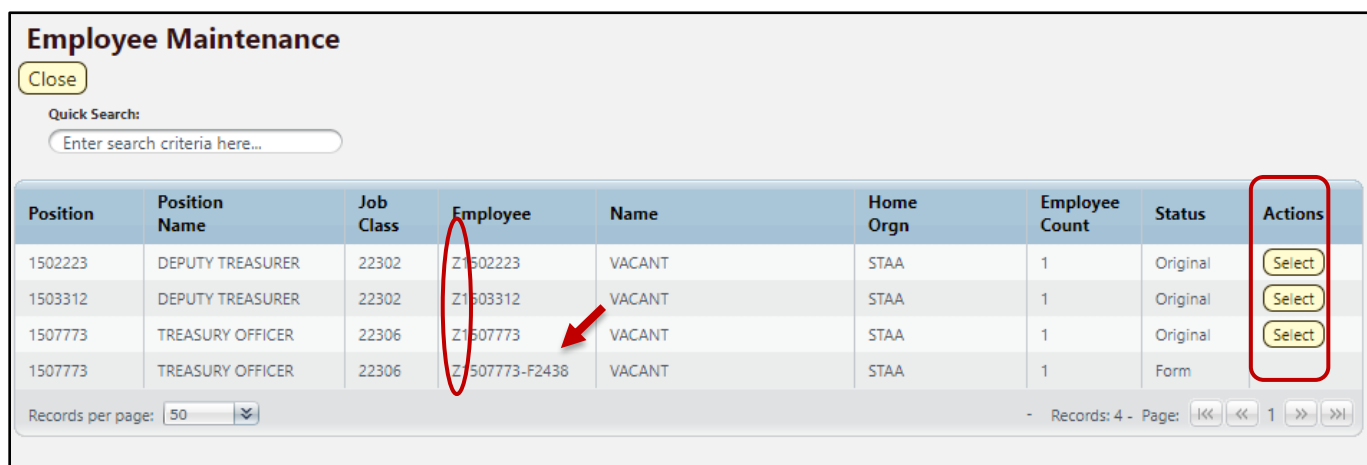
Position #	Approp	Job Class	Employee	Name	Count	FTP	Approval	Salary	Benefits	Total	Actions
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Funding Vacant Positions:

When the HR upload is initiated in mid-July, the start of a new fiscal year, it will consist of all the agency vacancies at that moment in time. As agencies move through the budget cycle, vacant positions will be filled and others will become vacant. However, this is to ensure that all the current positions for the agency, whether vacant or filled, are accounted for and the FTP cap and the personnel costs are noted in the base budget.

Adding positions one by one:

Select “Employee Changes” This will bring up the Employee Maintenance table with only the agency’s vacant positions at the time of the upload.



Position	Position Name	Job Class	Employee	Name	Home Orgn	Employee Count	Status	Actions
1502223	DEPUTY TREASURER	22302	Z1502223	VACANT	STAA	1	Original	Select
1503312	DEPUTY TREASURER	22302	Z1503312	VACANT	STAA	1	Original	Select
1507773	TREASURY OFFICER	22306	Z1507773	VACANT	STAA	1	Original	Select
1507773	TREASURY OFFICER	22306	Z1507773-F2438	VACANT	STAA	1	Form	

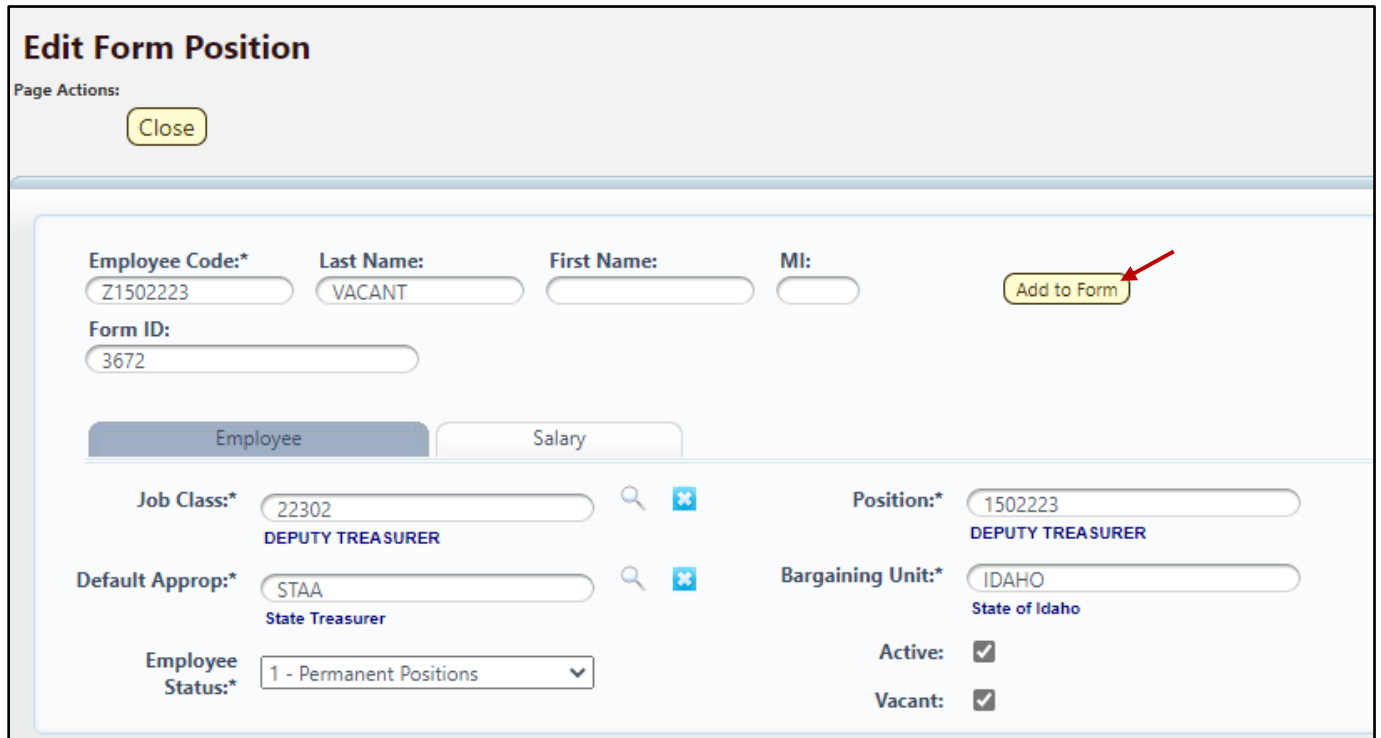
Vacant positions will now have a “Z” in front of the Position number and the name is “Vacant”. However, the arrow pointing to the Treasury Officer number of -F2438 behind the Employee Position number notes that this position has been updated or selected in another budget form such as the 8 series Transfer Form (5600).

Note: The Employee Maintenance table in the 8 series Transfer Form (5600) has all filled and vacant positions listed. The 8 Series Transfer Form (5600) will be where agencies will transfer funding for vacant positions and NOT in the Fund Vacant or Group Position Form (6300 & 4300). This way when pulling in the information for reporting, any transfer changes are shown in one form and one table.

Select the employee where a salary needs to be verified or there is a change to the salary. “Select” will bring up the Edit Form Position screen. This process is similar to the 8 series Transfer Form (5600).

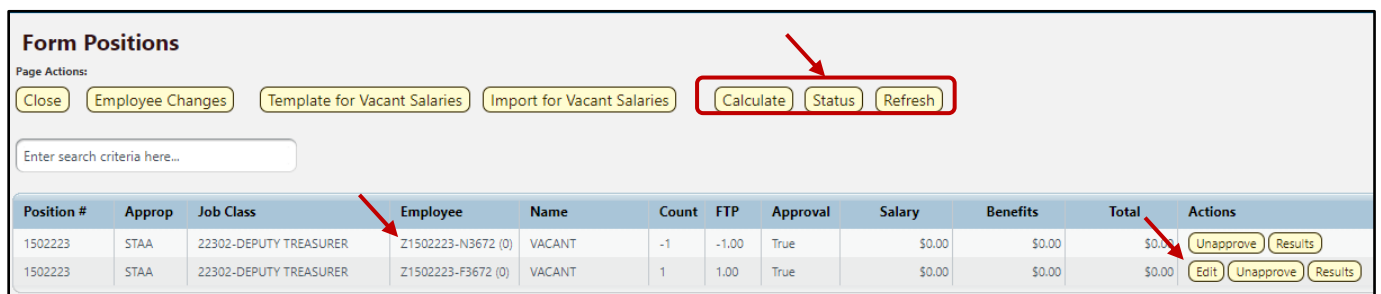
This screen is not able to be changed, note that there is no Save button.

Select “Add to Form”.



This system will return to the Employee Maintenance Table where additional vacant positions can be added. If there are no other additions, select “Close”. The system will then return to the Summary Overview with the positions.

Select “Close” to return to the Position Tab overview summary screen.



Position #	Approp	Job Class	Employee	Name	Count	FTP	Approval	Salary	Benefits	Total	Actions
1502223	STAA	22302-DEPUTY TREASURER	Z1502223-N3672 (0)	VACANT	-1	-1.00	True	\$0.00	\$0.00	\$0.00	Unapprove Results
1502223	STAA	22302-DEPUTY TREASURER	Z1502223-F3672 (0)	VACANT	1	1.00	True	\$0.00	\$0.00	\$0.00	Edit Unapprove Results

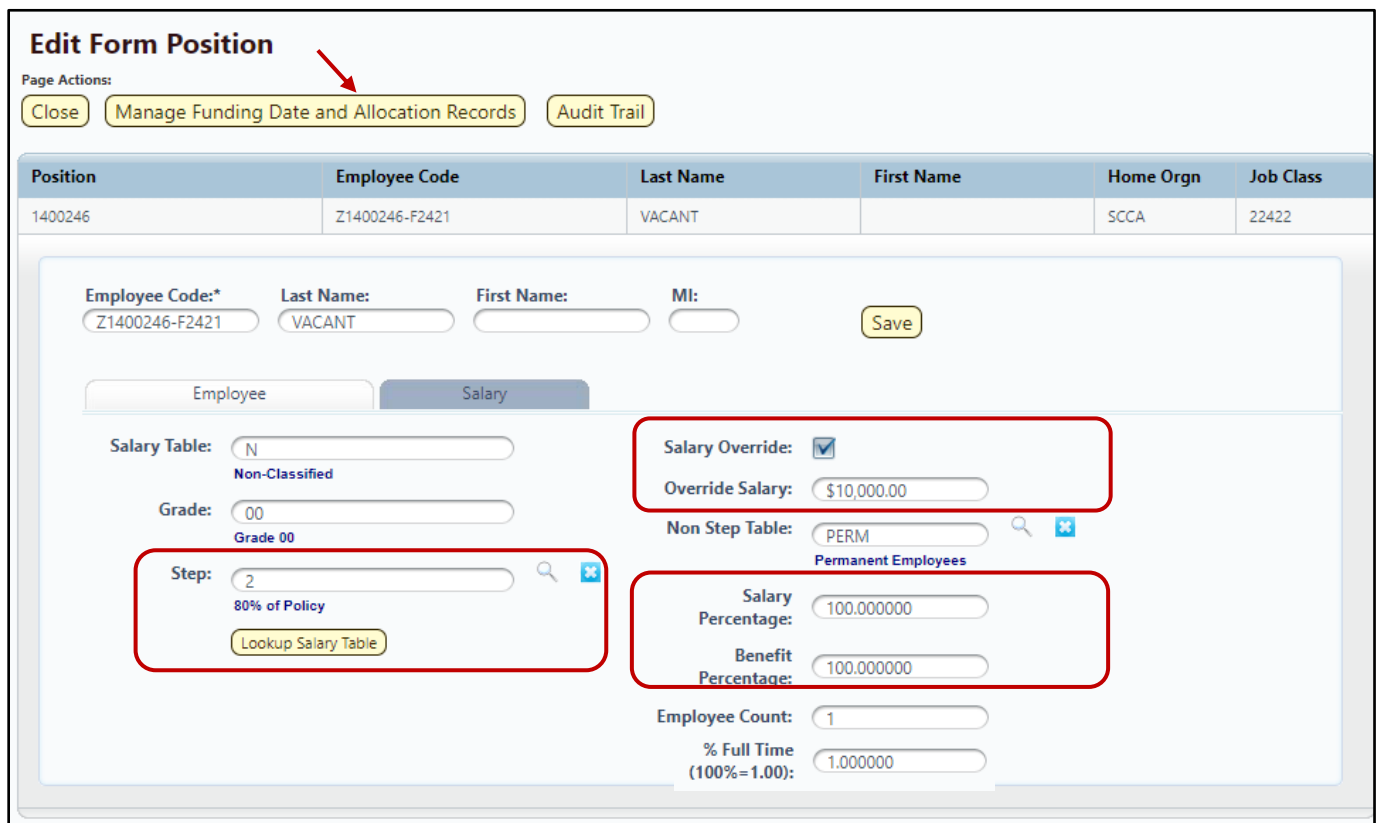
Note: The Salary and Benefits for the vacant position is populated with the last incumbent's rates. Adding the position creates two entries, a negative one to remove the position's salary and benefit rates and a positive one to edit the position rates.

If no edits are needed for the vacant positions, select Calculate and wait 45 seconds or more, and refresh the screen. This will populate the salary, benefit, and totals for this position.

While waiting for the salary to populate, the system will allow working on other functions and screens in the system.

On "Form Position Screen" to edit or add the salary and benefit rates, select "Edit".

"Edit" will bring back the "Edit Form Position" screen. The form now has a "Save" button to record any changes to the salary rate percentages and the benefit percentages. The employee tab (with position, job class, approp. unit, etc.) should not be changed on this screen. Only "Salary" tab records should be updated if necessary.



Edit Form Position

Page Actions: [Close](#) [Manage Funding Date and Allocation Records](#) [Audit Trail](#)

Position	Employee Code	Last Name	First Name	Home Orgn	Job Class
1400246	Z1400246-F2421	VACANT		SCCA	22422

Employee Code:* Last Name: First Name: MI: [Save](#)

[Employee](#) [Salary](#)

Salary Table:
Non-Classified

Grade:
Grade 00

Step:
80% of Policy
[Lookup Salary Table](#)

Salary Override: ☒
Override Salary:

Non Step Table:
Permanent Employees

Salary Percentage:
Benefit Percentage:

Employee Count:
% Full Time (100%=1.00):

Uncheck the Salary Override box and let it default if the agency funds vacant positions at 80% of the policy.

Or select Salary Override and put in the appropriate salary. Lookup Salary Table is available for reference on the paygrades.

Populate the “Salary” and “Benefit Percentage” (“Benefit Percentage” defaults to zero). If this is if a full-time position not taking benefits or the position is changing to Part-time with no benefits, leave the default at zero. However, if this is a fully benefitted position, change the percentage to 100%.

If this vacant position is changing to a part-time position, this is where the percentages can be changed by changing the “% Full Time” to a .50 or .75. depending on what is being requested. The salary percentage or benefits do not need to be changed, the system will calculate the changes by changing the overall FTP status.

If there is a change in funding dates, allocations, or benefits, the “Manage Funding Date and Allocation Records” option is available.

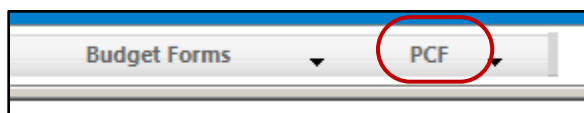
After all the changes have been made, closeout of the “Edit Form Position” screen and select the “Calculate” action button.

The process above is recommended if agencies do not have a lot of vacant positions and can easily select and change what is necessary.

For agencies that have multiple vacancies or just want to upload the salary and benefits, Luma Budget has this option.

Adding Multiple Positions via “Export” and “Upload”

On the Home page top menu of the Luma Budget system, select the PCF tab. Then select “Vacant Positions” to view the Vacant Positions Report. This report will bring up a listing of the agency's loaded vacant positions.



Vacant Positions

Quick Search:

Actions:

Position #	Class Code	Employee Name	Annual Salary	Salary % (75 = 75%)	FTP % (50 = 50%)	Class Name
1400121	01730	VACANT	25000.000000	100.000000	100.000000	IT INFO SYS AND INFR ENG II
1400201	01731	VACANT	0.000000	100.000000	100.000000	IT INFO SYS AND INFR ENG III
1400207	01743	VACANT	0.000000	100.000000	100.000000	IT MANAGER III
1400246	22422	VACANT	0.000000	100.000000	100.000000	PAYROLL SUPPORT ANALYST
1400257	04246	VACANT	0.000000	100.000000	100.000000	FINANCIAL SPECIALIST
1400259	02913	VACANT	0.000000	100.000000	100.000000	PROJECT COORDINATOR
1502223	22302	VACANT	0.000000	100.000000	100.000000	DEPUTY TREASURER
1503312	22302	VACANT	0.000000	100.000000	100.000000	DEPUTY TREASURER
1507773	22306	VACANT	0.000000	100.000000	100.000000	TREASURY OFFICER
1830011	08908	VACANT	0.000000	100.000000	100.000000	RETIREMENT SPEC
1830017	01731	VACANT	0.000000	100.000000	100.000000	IT INFO SYS AND INFR ENG III
1830031	01231	VACANT	0.000000	100.000000	100.000000	ADMIN ASST 2

Records per page: 25 Records: 15 - Page: 1

Note: When Luma Budget is implemented, the Annual Salary will be populated.

Select "Export to XLSX".

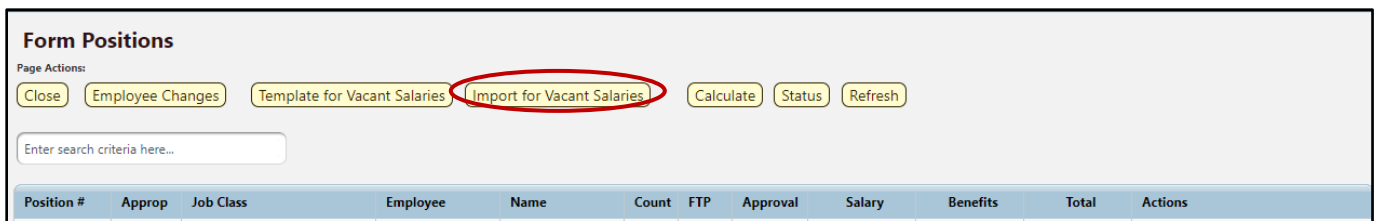
In this template, changes can be made to the Annual Salary, the FTP%, and the Salary % (if the position is going from Full-time to Part-time). Changes can be made to the spreadsheet as long as the net dollar change is zero for the Personnel Costs. These changes will be updated in the "Salary and Benefit Changes" (form 6200) as well. The upload will not import the "Class Name" column on the template, it is for reference only.

Position #	Class Code	Employee Name	Annual Salary	Salary % (75 = 75%)	FTP % (50 = 50%)	Class Name
1830011	08908	VACANT	0.000000	100.000000	100.000000	RETIREMENT SPEC
1830017	01731	VACANT	0.000000	100.000000	100.000000	IT INFO SYS AND INFR ENG III
1830031	01231	VACANT	0.000000	100.000000	100.000000	ADMIN ASST 2
1830065	04248	VACANT	0.000000	100.000000	100.000000	FINANCIAL TECHNICIAN
1830069	01715	VACANT	0.000000	100.000000	100.000000	IT SOFTWARE ENGINEER II
1830077	20158	VACANT	0.000000	100.000000	100.000000	INVESTMENT OFFICER
						Reference Only. The class name will not import over.

Note: Whenever there is a Position Tab, it will record the changes to the salary and benefits table and may require a repopulation of the Salary and Benefit Change Form (6200).

If a vacant position were to go from Part-time to Full-time and include benefits, that would be an enhancement to the Base Budget. Agencies should load the position “as is” and not record the change to the Part-time position. Any increase to a base budget should be completed in the Supplemental and Line Item Request Form (5100).

Once all the changes have been made to the template, this can be imported into the Vacant Position Budget Form. The import will automatically default to Approved. Select “Calculate” to populate salary and benefits. Select “Refresh” to see if the calculation is completed.



Form Positions

Page Actions:

[Close](#) [Employee Changes](#) [Template for Vacant Salaries](#) [Import for Vacant Salaries](#) [Calculate](#) [Status](#) [Refresh](#)

Enter search criteria here...

Position #	Approp	Job Class	Employee	Name	Count	FTP	Approval	Salary	Benefits	Total	Actions
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Once the spreadsheet is imported, the system will generate two entries, one that is a negative to back out the original information and a positive to record the new information. Agencies can still make changes position by position to the upload by using the “Edit” button.

Remember, there is no line or position delete. However, the position can be unapproved and the entry for salaries and benefits will return to zero.

If there are multiple changes needed to your vacant positions, you may want to consider deleting the Parent Transaction and re-uploading the corrected spreadsheet. If the vacant report is uploaded to this form for a second time, it will not record changes.

Form Positions

Page Actions: [Close](#) [Employee Changes](#) [Template for Vacant Salaries](#) [Import for Vacant Salaries](#) [Calculate](#) [Refresh](#)

Enter search criteria here...

Position #	Approp	Job Class	Employee	Name	Count	FTP	Approval	Salary	Benefits	Total	Actions
1830011	GVFA	08908-RETIREMENT SPEC	Z1830011-N3230 (1)	VACANT	-1	-1.00	True	\$0.00	\$0.00	\$0.00	Unapprove Results
1830011	GVFA	08908-RETIREMENT SPEC	Z1830011-F3230 (1)	VACANT	1	1.00	True	\$45,000.00	\$21,160.52	\$66,160.52	Edit Unapprove Results
1830017	GVFA	01731-IT INFO SYS AND INFR ENG	Z1830017-N3230 (1)	VACANT	-1	-1.00	True	\$0.00	\$0.00	\$0.00	Unapprove Results
1830017	GVFA	01731-IT INFO SYS AND INFR ENG	Z1830017-F3230 (1)	VACANT	1	1.00	True	\$65,000.00	\$25,387.42	\$90,387.42	Edit Unapprove Results
1830031	GVFA	01231-ADMIN ASST 2	Z1830031-N3230 (1)	VACANT	-1	-1.00	True	\$0.00	\$0.00	\$0.00	Unapprove Results
1830031	GVFA	01231-ADMIN ASST 2	Z1830031-F3230 (1)	VACANT	1	1.00	True	\$37,500.00	\$19,575.44	\$57,075.44	Edit Unapprove Results
1830065	GVFA	04248-FINANCIAL TECHNICIAN	Z1830065-N3230 (1)	VACANT	-1	-1.00	True	\$0.00	\$0.00	\$0.00	Unapprove Results
1830065	GVFA	04248-FINANCIAL TECHNICIAN	Z1830065-F3230 (1)	VACANT	1	1.00	True	\$40,000.00	\$20,103.80	\$60,103.80	Edit Unapprove Results
1830069	GVFA	01715-IT SOFTWARE ENGINEER II	Z1830069-N3230 (1)	VACANT	-1	-1.00	True	\$0.00	\$0.00	\$0.00	Unapprove Results
1830069	GVFA	01715-IT SOFTWARE ENGINEER II	Z1830069-F3230 (1)	VACANT	1	1.00	True	\$60,000.00	\$24,330.70	\$84,330.70	Edit Unapprove Results
1830077	GVFB	20158-INVESTMENT OFFICER	Z1830077-N3230 (1)	VACANT	-1	-1.00	True	\$0.00	\$0.00	\$0.00	Unapprove Results
1830077	GVFB	20158-INVESTMENT OFFICER	Z1830077-F3230 (1)	VACANT	1	1.00	True	\$56,000.00	\$23,485.32	\$79,485.32	Edit Unapprove Results

Agencies will also have the ability to download a blank template and create an upload from scratch if they so desire.

Note: Be aware that even if there are no changes, Agencies will need to populate the budget form. If this is not completed, the Vacant Positions will not show up on the PCF report. Your analysts require a review and reporting by the agencies of their vacant positions.

Detail Tab

The Detail tab will have the totals of the vacant position changes in salaries and benefits at the top of the screen. The changes should equal zero (once the salaries from the incumbents are populated) if funds are being moved around from positions. If there is a value other than \$0 in the change column you will need to correct this and possibly submit a Supplemental or Line Item Request if the change was intentional.

Budget Form Lines

[Close](#) [Export](#) [Import](#) [Refresh](#)

ID	Form	Agency	Form Name	Salary Changes	Benefit Changes	Total Changes	FTP Changes
3230	6300	183 - Public Employee Retirement Syst	Vacant Positions & Other PC	\$5,500	\$0	\$5,500	0.00

Quick Search:

Actions: [Add New](#) [Copy](#)

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	Account*	OG / OT*	Line #	FTP Adjustment Amounts*	Other Adjustment Amounts*	Comments / Notes
1		GVFA	55000	0	0	0	500	OG	1000	0.00	5,500	Shift Differential

Records per page: 50

Records: 1 - 1 of 1 - Pages: 166 - 1

Many agencies note Other Adjustments such as; Shift Differential, Holiday Overtime, etc. These adjustments can be added into the Detail Tab with the “Add New” and “Copy” actions. Changes added on this detail tab will show in the “Other adjustments” section of the PCF report.

As with the other Detail Tabs, there is the option of exporting and importing information.

Attachment Tab:

This Budget Form also has an Attachment Tab to include any documents needed to accompany this form.

Result

You have successfully completed the Vacant & Other PC Adjustments (6300).

For additional training, please visit the SCO website and Luma training in the Training tab.

Date: April 9, 2021

Version 1